📑 EVnation Billing & Invoicing Process

1. Invoice Creation in Pipedrive → QuickBooks

1. Go to the **Deal** in **Pipedrive**.
2. Select **Invoice** → **Invoice again** from the drop-down menu.
3. A **pop-up screen** will appear. Fill it in as follows:
    - **Other:** Enter **Electrum**
    - **Item Type:** Enter **Electrum** again, and select from the drop-down
    - **Invoice No.:** Enter the **Project Number**
    - **Unit Price:** Enter the **Total Job Price**
4. Click **Create Invoice**.
5. ✅ Once created, the invoice is automatically synced and created in **QuickBooks**.

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2. Billing Process (Paying Electricians)

1. Bill authorization will come from **Neil** or **Cameron**, with a note “OK to pay” and the **Profit Amount**.
2. When you receive the email:
    - Go to **QuickBooks**
    - Search using either the **Customer ID** or **Project ID**
    - Confirm if the invoice exists.
3. If invoice already exists in QuickBooks:

    - Create the **Bill** for the electrician against that invoice.

4. If invoice does **not** exist in QuickBooks:

    - Request that it be created in **Pipedrive** (which will sync to QuickBooks),

    - Or create the invoice yourself in **Pipedrive** following Step 1.

✅ Key Notes:

- Always use **Project Number as Invoice No.** for tracking.

- Double-check invoice sync in QuickBooks before creating bills.

- Only pay bills once an “OK to Pay” note is received from Neil or Cameron.